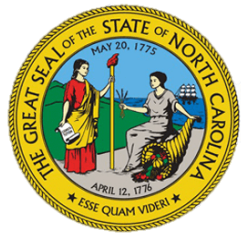# CVMS Provider Portal Log In and Getting Started User Guide

Version 3

January 15, 2021

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**HEALTH AND
HUMAN SERVICES**

# If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at
## https://ncgov.servicenowservices.com/csm_vaccine

\* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

   For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
3. You will receive an e-mail with your username and temporary password to log into the portal

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# Table of Contents

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# Log in and Getting Started with the CVMS Provider Portal

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# Overview



The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine.

**This portal is different from the CVMS Provider Enrollment Portal, where Healthcare Providers enrolled for approval to administer the COVID-19 vaccine.**

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Location Manager and Healthcare Provider** profiles.

*Additionally, you will need to:*
- Use the latest version of Chrome, Firefox, Safari, Edge Chromium browsers.

**Now, let's get started!**

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# Log In to the CVMS Provider Portal

How do I log in to the CVMS Provider Portal?

# Step 1 of 3: Enter NCID and NCID Password

1. The link to the CVMS Provider Portal will open a NCID Log-In Screen

2. Enter your **NCID Username** and **NCID PASSWORD**

3. Click **NCID LOGIN**

4. You are logged in to the CVMS Provider Portal

*For guidance on obtaining an NCID, refer to the Appendix.*



**Tasks**

Log into CVMS Provider Portal

**Tips**

Remember your NCID username and password.

Your NCID must be linked to your profile prior to your first log in. Contact your Organization Administrator for CVMS to request to be added to CVMS.
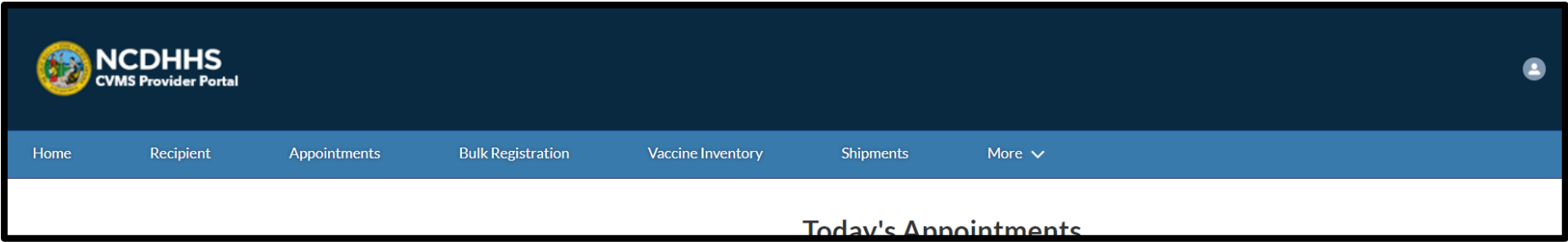
**Audience**

| Healthcare Provider |

| Healthcare Location Manager |

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# Step 2 of 3: View the CVMS Provider Portal Tabs

*In the CVMS Provider Portal, **TABS** help you navigate between pages. The **TABS** you see are based on your user profile, Healthcare Location Manager or Healthcare Provider.*

1.  Healthcare Location Managers have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION, VACCINE INVENTORY, SHIPMENTS** and **HELP & INFORMATION**



2. Healthcare Providers have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS** and **HELP & INFORMATION**



**Tasks**

Explore the Homepage

**Tips**

**Learn more** about managing your recipient's appointments in the **CVMS Provider Portal Recipient Check-In User Guide.**

**Audience**

| Healthcare Provider |
|---|

| Healthcare Location Manager |
|---|

1. On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY'S APPOINTMENTS**.

   Please note that the Date of Birth will be displayed as follows: Year – Month – Day.



**Audience**

| Healthcare Provider |
|:---:|

| Healthcare Location Manager |
|:---:|

# Healthcare Location Manager: Navigate the CVMS Provider Portal

How do I navigate the CVMS Provider Portal as a Healthcare Location Manager?

# Step 1 of 5: Recipient Tab Overview



1. The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

2. Click the **RECIPIENT'S NAME** to view their account.

3. Your search results will also include any records of a recipient who received a COVID-19 vaccine dose with their long-term care facility provided by a State of North Carolina pharmacy partner.

**Tasks**

View Recipient tab

**Tips**

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide.**

**Audience**

Healthcare Location Manager

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# Step 2 of 5: Bulk Registration Tab Overview



1. The **BULK REGISTRATION** tab allows you to upload a list of employees and generate their invitation to register in CVMS to receive a COVID-19 vaccine.

**Note: This tab will only be available if you have the Healthcare Location Manager profile.**
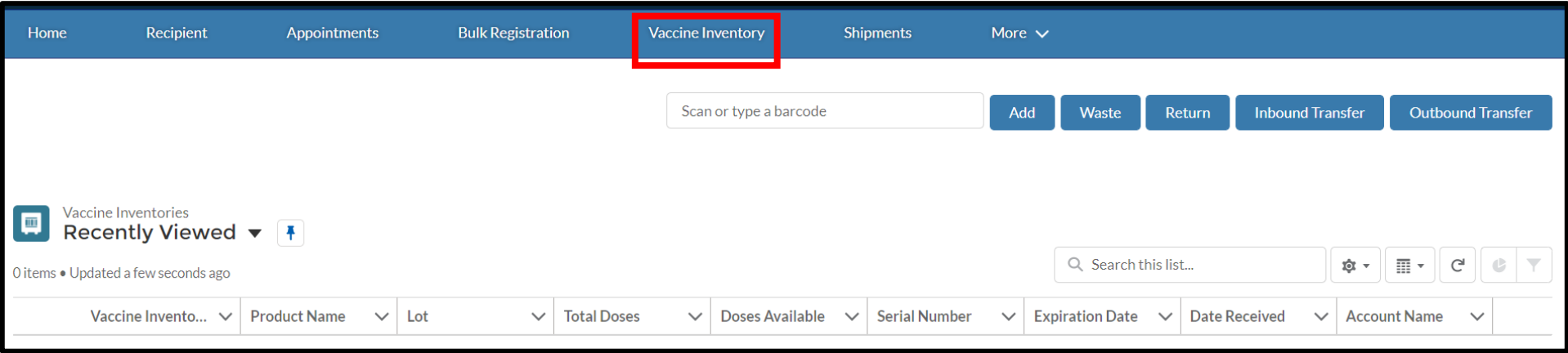
**Tasks**

View Bulk Registration tab

**Tips**

Learn more about uploading your staff information in the **CVMS Provider Portal Recipient Bulk Upload User Guide.**

**Audience**

**Healthcare Location Manager**

# Step 3 of 5: Vaccine Inventory Tab Overview



1. The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory

2. To pin a list view, click 📌 . The pinned list view will then load as the default list view.

3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record ⬆ (alphanumerically) or its last ⬇ (Down Sort icon).

4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

**Note: This tab will only be available if you have the Healthcare Location Manager profile.**

**Tasks**

View Vaccine Inventory tab

**Tips**

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Vaccine Inventory Wastage, Returns & Transfers User Guide.**

**Audience**

Healthcare Location Manager

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# Step 4 of 5: Shipments Tab Overview



**Tasks**

View Shipments tab

**Tips**

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving & Processing Vaccine Inventory Shipments User Guide.**
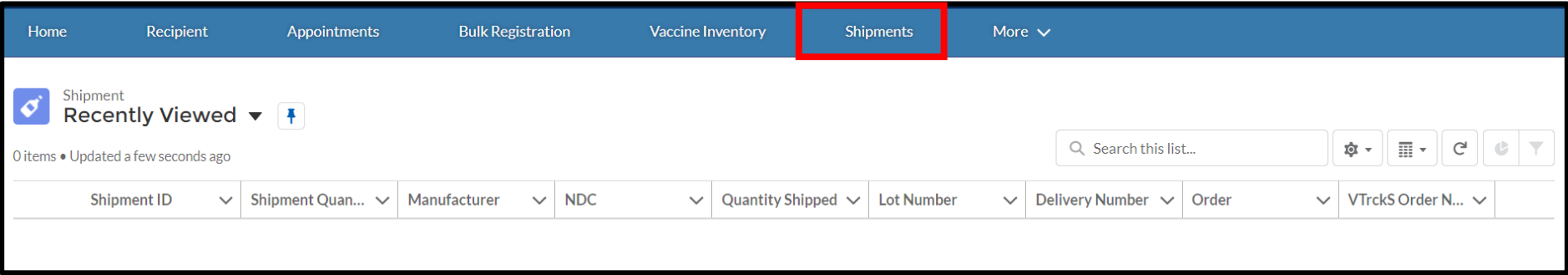
1. The **SHIPMENTS** tab allows you to see your location's COVID-19 vaccine shipment information

2. To pin a list view, click 📌 . The pinned list view will then load as the default list view.

3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record ⬆ (alphanumerically) or its last ⬇ (Down Sort icon).

4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

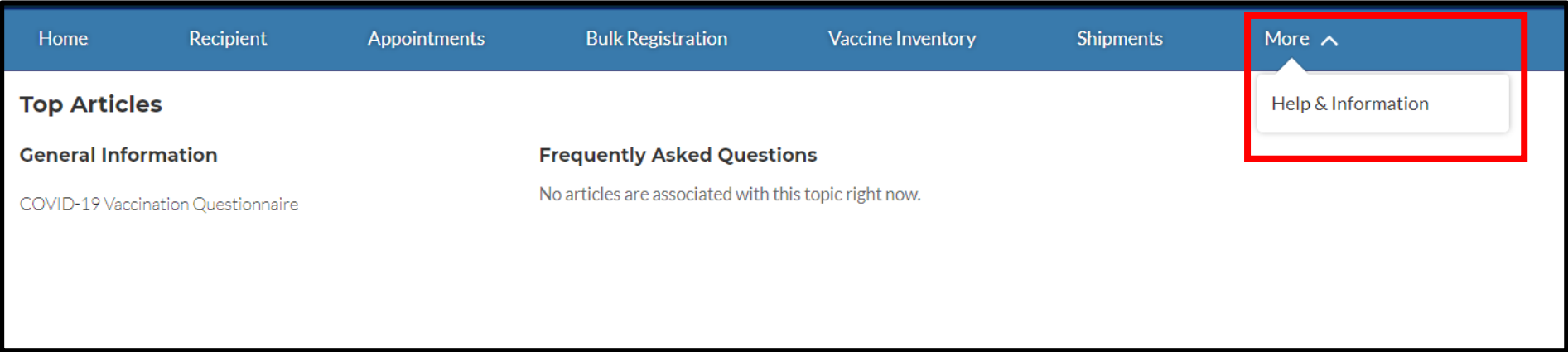**Note: This tab will only be available you have the Healthcare Location Manager profile.**

**Audience**

> Healthcare Location Manager

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# Step 5 of 5: Help and Information Tab Overview

| Home | Recipient | Appointments | Bulk Registration | Vaccine Inventory | Shipments | More ⌃ |
|------|-----------|--------------|-------------------|-------------------|-----------|--------|

**Top Articles**

Help & Information

**General Information**

**Frequently Asked Questions**

COVID-19 Vaccination Questionnaire

No articles are associated with this topic right now.

1. The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccination (Health) Questionnaire.

**Tasks**

View Help & Information tab

**Tips**

Learn more about finding support in the **CVMS Provider Portal Accessing Help Resources User Guide.**

**Audience**

**Healthcare Location Manager**

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# Healthcare Provider:
# Navigate the CVMS Provider Portal

How do I navigate the CVMS Provider Portal as a Healthcare Provider?

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# Step 1 of 2: Recipient Tab Overview



1. The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

2. Click the **RECIPIENT'S NAME** to view their account.

3. Your search results will also include any records of a recipient who received a COVID-19 vaccine dose with their long-term care facility provided by a State of North Carolina pharmacy partner.

**Tasks**

View Recipient tab

**Tips**

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Check-In User Guide.**

**Audience**

Healthcare Provider

# Step 2 of 2: Help and Information Tab Overview



1. Within the **HELP & INFORMATION** tab, you can see Frequently Asked Questions about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccination (Health) Questionnaire.

**Tasks**

View Help & Information tab

**Tips**

Learn more about finding support in the **CVMS Provider Portal Help Resources User Guide.**

**Audience**

Healthcare Provider

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# Appendix

# Additional Notes

**Key Items:**

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- **\* Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

**Contact Information:**

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.
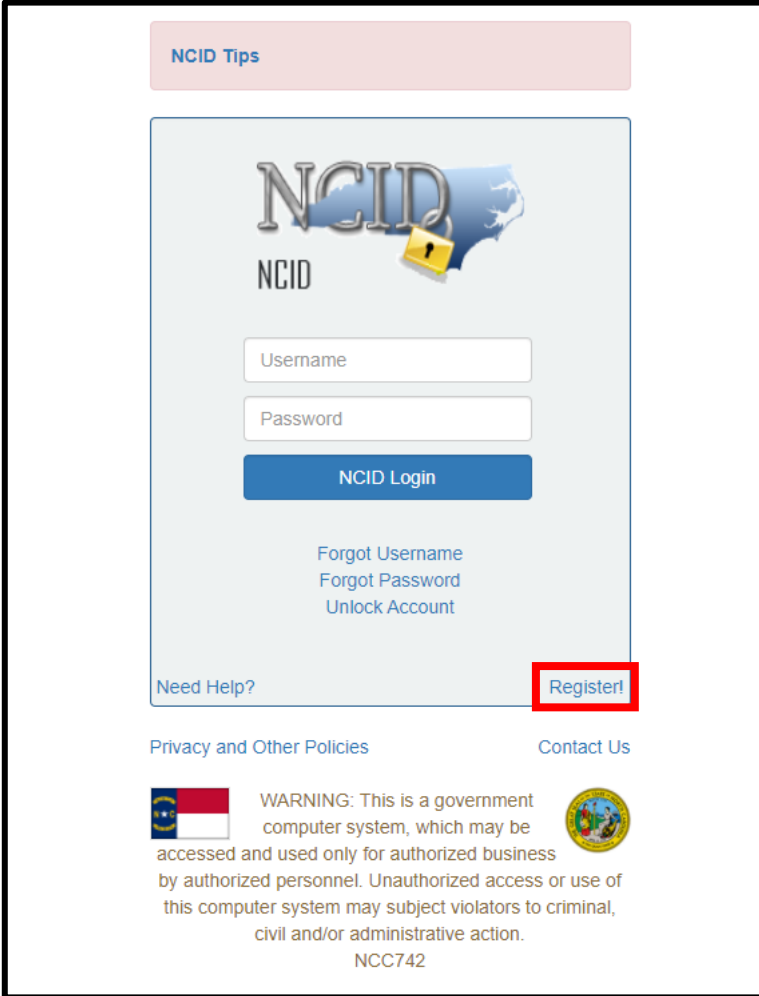
**Supported Web Browsers:**

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium to access CVMS.
- For more details on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

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# How to Obtain an NCID

**Instructions for a user to create an NCID:**

- Navigate to https://ncid.nc.gov/
- Click **Register!** (in the bottom right corner of the blue box)
- Click **Business** user type option
- Complete the required fields to create an NCID
- Follow the steps to access your NCID account **and** create your security questions

- Once created, you will need to provide your NCID username to the designated Vaccine Coordinator for your location so they can request access to CVMS for you.

- Once access has been granted by NC DHHS, the Vaccine Coordinator for your location should notify you that you are able to log in to the CVMS Provider Portal.

- If you have any questions **or need assistance in identifying the Vaccine Coordinator for your location**, please submit all inquiries to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

# User Guide Change Log

**Key Items:**

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

| Version | Date of Change | Changes Made | Impacted Slides | Author |
|---------|----------------|--------------|-----------------|--------|
| 1 | 12/10/2020 | • Uploaded the first version of the PPT | ALL | Training Team |
| 2 | 1/10/2021 | • Removed any mention of the 2 CVMS Help Desk emails<br>• Added Service Now Portal information<br>• Screenshot of new bulk upload added | 1, 2, 12, 20, 21 | Courtney Seward |
| 3 | 1/15/2021 | • Updated navigation bars for both CVMS Provider Profiles<br>• Updated Recipient Tab search feature | 11, 17 | Azalea Troche |
| | | | | |

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